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Food forward: How governments can be more intentional about food security

A holistic and tailored approach to feeding a growing global population

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EXECUTIVE SUMMARY

Food security is a critical and increasingly complex policy priority for governments worldwide, involving deep-rooted, systemic challenges across global and national food systems. Population growth, geopolitical risks, trade fragility, technology, and climate change are intensifying these challenges. But food security is a multifaceted topic. Targeted initiatives, if not fully thought out, can have unexpected consequences—improving performance in one aspect of the food system while unintentionally worsening performance in others.

Governments need a comprehensive approach that addresses the four pillars of food security: availability, affordability, safety and quality, and sustainability. Policymakers have a variety of tools they can use, including regulatory policies, funding, education, and technology. By starting with a clear understanding of their current situation and greatest needs, governments can choose the right set of tools for their unique context, ensuring that they can meet the food needs of their citizens and the rest of the world.

THE FOUR PILLARS OF FOOD SECURITY

The global population is expected to reach 9 billion to 10 billion by 2050. This growth will drive higher food demand in a world already grappling with food security challenges. Currently, around 10 percent of the global population is undernourished.[1] Moreover, global disruptions, such as armed conflict, the COVID-19 pandemic, trade barriers, and worsening climate change, underscore the urgent need for governments to prioritize food security and resilience, ensuring affordable access to staple foods and a thriving agricultural sector.

Food security rests on four pillars:

- ***Availability.*** Ensuring that sufficient quantities of essential food products are consistently accessible to meet people's dietary needs.
- ***Affordability.*** Making food economically accessible so people can obtain it without financial strain.
- ***Safety and quality.*** Guaranteeing that food is free from harmful contaminants while providing recommended nutrients.
- ***Sustainability.*** Maintaining food systems that are environmentally sound, economically viable, and socially responsible, to provide for future generations.

To improve food security, policymakers must address all four pillars simultaneously. This is a complex task, but it is not impossible. Success requires coordinated, proactive policies that are customized to reflect the unique circumstances and challenges of each country or region.

How isolated initiatives go wrong

Each pillar of food security may be attainable in isolation, but because the pillars are often interdependent, progress in one area can inadvertently undermine progress in another. For instance, intensifying agricultural production to boost availability can compromise sustainability through soil degradation, water depletion, or climate impact. Another example: Enforcing strict food safety standards, although essential for public health, can increase production costs and waste, making food less affordable.

These are not theoretical arguments. Consider Sri Lanka's push for organic farming. In 2021, the country was highly dependent on both rice (where domestic production was sufficient to meet national needs, that is, it had reached self-sufficiency), and tea, its largest export. The Sri Lankan government abruptly banned synthetic fertilizers and pesticides, without a gradual rollout, aiming to reduce spending on these inputs and encourage more sustainable agricultural practices.

The ban led to a 20 percent drop in rice production, causing Sri Lanka to import US$450 million worth of the grain to meet domestic demand. Tea production dropped by approximately 18 percent. The Sri Lankan government ultimately intervened to subsidize farmers for income lost due to the reduced production levels and eventually lifted the ban on the use of synthetic crop inputs.[2]

Egypt offers another example. The country imports approximately 12.5 million tons of wheat each year—more than any other country—to feed its population of roughly 110 million. Historically, Egypt has significantly subsidized the sector to keep bread prices under control and has sourced 82 percent of its wheat from two nations: Ukraine and Russia, which provided the most affordable prices. After the onset of the 2022 war between those two exporting nations, Egypt's wheat supply chain was left exposed, requiring it to modify its wheat procurement strategy and import wheat from other regions. The prioritization of affordability in this case left availability at risk, with the government's postwar reaction forecast to increase subsidy spending by 42 percent.[3]

Beyond food trade itself, disruptions to the oil and gas trade can also affect food prices. Costs are rising across key food systems inputs, such as fertilizer, transport fuels, and packaging. The most recent conflict-driven supply chain shocks, for example, drove fertilizer prices up by as much as 50 percent, affecting how much fertilizer farmers can use. Trickle-down effects are expected on crop yields and the price of food items.[4,5]

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FIVE TOOLS THAT CAN IMPROVE FOOD SECURITY

Achieving a balance across all four pillars of food security requires a comprehensive, multi-lever approach that governments can tailor to their unique circumstances. Although context differs, government ministries can apply five tools to improve food security (*see Exhibit 1*).

***Technology and AI-driven innovation*.** Support the deployment of technology and AI that enhances efficiency and productivity across the food ecosystem, and empower technology players to develop solutions tailored to the needs of the market.

***Funding and incentives*.** Provide financing and other incentives to shift behaviors among producers and consumers toward food security goals.

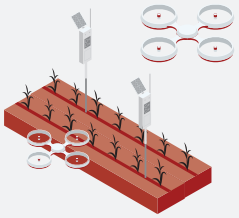
***Education and partnerships*.** Launch training and awareness campaigns to spur the adoption of desired capabilities and consumption trends.

***Strategy and planning*.** Develop and steer national and regional policies and plans to ensure alignment and complementary benefits for various stakeholders in the food ecosystem.

***Policymaking and regulation*.** Set overall guidelines for food security, along with enforcement mechanisms to ensure proper execution.

EXHIBIT 1

The food security action tool kit

01	02	03	04	05
Technology and AI-driven innovation. Invest in and deploy technologies and **AI-driven solutions** that enhance efficiency, traceability, monitoring, and productivity in the food sector.	**Funding and incentives.** Provide **funding** and **non-monetary incentives** to shape production, improve supply, stabilize prices, and support groups in need.	**Education and partnerships.** Launch **training** and **awareness campaigns** to build capabilities and **establish partnerships** to drive progress.	**Strategy and planning.** Develop and steer **national** and **sectoral strategies** to **ensure alignment** across various ecosystem stakeholders.	**Policymaking and regulation.** Create policies to support food security and **enforcement mechanisms** to ensure proper execution.
				

Source: Strategy& analysis

TAILORING A FOOD PROGRAM TO THE NEEDS OF SPECIFIC COUNTRIES

Countries have widely varying strengths and needs in terms of food security. Nonetheless, they fall into four broad archetypes, defined by their current situation, their past successes, and areas where they still need to improve. Governments can prioritize and sequence tools from the food security action tool kit according to their archetype and the food security pillar (or pillars) requiring the greatest attention, ensuring that interventions are targeted, coherent, and fit for purpose.

Archetype 1: Capital-powered resilience architects

The first archetype includes high-income nations that are limited in their natural resources, such as Oman, Saudi Arabia, and the United Arab Emirates (UAE), but that have improved food affordability, availability, and safety through top-down strategy, planning, policymaking, capital deployment, overseas supply chain investments, imports, and agricultural technology (agritech). They have made these improvements despite extreme climates, limited arable land, and water scarcity.

For example, Oman embedded food security within its Oman Vision 2040 and has invested $4.9 billion in agriculture and fisheries-related projects, including infrastructure upgrades.[6]

Likewise, Saudi Arabia made food security a core element of Saudi Vision 2030, prioritizing reducing food waste, achieving self-sufficiency, and strengthening its strategic reserves. Its Agricultural Development Fund allocated $533 million to support greenhouse farming and production of different critical crops and animal protein commodities.[7]

The UAE took similar steps, setting short- and long-term food security goals as part of its National Food Security Strategy 2051. On safety, it launched a program to revamp the regulatory framework that governs aquaculture safety and quality standards.[8] To improve affordability, it eliminated import duties on key commodities such as wheat, rice, and corn.

Improvement priority: Strengthen supply chain resilience to preserve availability and accelerate the use of technology to improve sustainability
To build on their progress, and in light of recent supply chain disruptions, import-dependent Archetype 1 countries should aim to diversify their trade routes in order to ensure consistent food access in times of uncertainty.

These countries' systems are based mainly on non-renewable energy, which has come at the expense of sustainability. To build on their progress, these countries can accelerate their adoption of technology, with the goal of improving sustainability without undermining availability, affordability, and quality.

Updated strategic direction, policymaking, and planning designed to expand trade networks. Governments should look to steer critical commodity imports toward a geographically diversified portfolio. Alternative import options could potentially be more expensive; in those cases, food security mandate owners can introduce mechanisms that

offset the increased cost and steer private-sector importers toward the desired change. This helps ensure option availability in times of supply chain stress.

Continued investments in AI-enabled agritech at scale. Solutions such as controlled environment agriculture (e.g., greenhouse cultivation, hydroponics, and vertical farming) can be crucial in pushing the sustainability agenda forward. Similarly, advanced irrigation techniques and AI-enabled precision agriculture, surveillance, and logistics have been shown to reduce water consumption by as much as 50 percent.[9]

A greater reliance on energy-efficient technologies in the food value chain—mainly desalination—is another key lever. Work on this shift has already begun in some regions. For example, Abu Dhabi's Investment Office prioritized pioneering in agritech and AI, earmarking roughly $14 billion for an accelerator program to foster innovation and R&D in the sector.[10]

***Tailored funding and incentives*.** Governments and development banks can push financing vehicles such as grants, low-interest loans, or blended finance facilities that combine public and private capital to help small and medium-sized farm operations invest in agritech and help direct investment into this space. Moreover, governments can seek co-investing opportunities, wherein the government can take a direct stake in key players and their commercial activities or act as a co-investor, providing capital to generate confidence and attract further investments while keeping costs in check.[11]

***Education initiatives*.** Education initiatives can equip farmers with the skill set to adopt agritech. One proven approach is to establish pilot farms: These dedicated facilities give learning opportunities to farmers in low-business-risk environments.[12] Governments can also develop AI-powered advisory platforms that provide farmers with personalized, real-time guidance on crop management, input use, and climate adaptation.

***Public–private partnerships*.** Governments and farmers in the region can establish public–private partnerships (PPPs) with leading technology suppliers to localize agritech, rather than simply importing solutions.[13] On the supply chain front, inter-governmental collaboration can allow for establishing strong inland trade corridors as a work-around to at-risk shipping chokepoints.

Archetype 2: Affordability-first access builders

The second archetype includes countries that have focused primarily on affordability, ensuring their population's access to basic foods through subsidies, safety nets, and staple crop programs. These include Egypt (as noted above), Pakistan, and Thailand. Pakistan subsidizes wheat, sugar, oil, and rice through government programs and co-ops to ensure affordability.

Thailand adopted a multipronged approach to improving affordability. On a macro level, it provided a $300 cash stimulus (equivalent to $650 in purchasing power parity) to low-income households in 2024 to boost their consumption. The government stabilizes the price of rice, its most important staple, through subsidy schemes led by its Bank for Agriculture and Agricultural Cooperatives.[14]

Improvement priority: Increase regulation and education to provide safer and more nutritious products

Although the focus on affordability is understandable—and has enormous public health value—these countries can expand their focus to also improve food quality and health metrics. Calories are accessible and affordable, but healthy and safe diets are not. Accordingly, a key priority is to revamp policy, and drive stronger regulation and education in several areas.

***Nutrition education*.** Education ministries and food authorities should partner to integrate nutrition literacy into school curricula and guarantee healthy school meals. This involves setting national dietary guidelines, training teachers, and monitoring compliance in school kitchens. For example, a program in Finland integrates nutrition education into the national school core curriculum and complements that with structured menus and nutrient standards in school kitchens.[15] (*See "Finland's comprehensive approach to food security," page 12*)

***Revamped subsidy policies*.** Repurposed subsidies and social protection mechanisms can shift consumption habits toward healthier and more nutritious foods, especially for poorer populations that, on average, have less nutritious diets.[16] For example, food vouchers or cash disbursements specifically for fruits, vegetables, and healthy protein ensure diet diversity without undermining affordability. South Korea successfully implemented this type of mechanism through its Agrifood Voucher program.[17] A key lesson from earlier programs is that any shift in subsidy or incentive policies must be carefully planned and phased in, to allow for fine-tuning and iterations without affecting overall affordability.

***Stricter food labeling*.** Providing consumers with the right nudges, triggers, and warnings about the food they're consuming can be vital in shifting consumer trends. For example, governments can combat the proliferation of low-nutrient foods by requiring foods to be labeled with words such as *high in salt, fat, or sugar*. Chile took this approach, leading to a drop of 15 to 35 percent in the per capita consumption of sugar-, sodium-, and fat-heavy products.[18]

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Archetype 3: Premium sustainability champions

The third archetype includes food-secure nations that are leading in terms of sustainability, safety, and health. These countries, such as Austria, Denmark, and Poland, have embraced progressive food policies to promote organic farming, climate-smart agriculture, traceability, local sourcing, and healthier diets. Changes in consumer behavior have been a driving force in the establishment of these policies, given people's greater interest in local, traceable, higher-quality foods in recent years.

Denmark boasts the world's highest organic market share; more than 12 percent of its food and beverage sales derive from organic products.[19]

Austria has also been a pioneer in sustainable food systems, leading the European Union with over 27 percent of its agricultural land certified organic.[20] The country has strong traceability frameworks, robust consumer education, rigorous animal welfare standards, transparent food labeling mandates, and an emphasis on local sourcing in public institutions.

Poland is set to progress toward a more sustainable food system. Its Common Agricultural Policy (CAP) Strategic Plan for 2023–2027 includes measures to expand organic farming, improve animal welfare, and support climate-smart practices.[21]

Improvement priority: Implement stronger planning and incentive policies to make food more affordable

The impressive sustainability results among these countries have led to higher production and compliance costs, driving food prices up and thus making food (especially the healthiest options, such as organic foods) less affordable. In Poland, for example, food inflation has exceeded 15 percent in recent years, pushing higher quality out of reach for some consumers. For that reason, government actions should focus on making healthy food more affordable.

Targeted subsidies. Governments can offset the difference between more expensive desirable products (such as organically produced foods) through targeted subsidies that improve affordability without impacting sustainability. Finland took this approach when it doubled the subsidy for organic milk in 2017, dramatically increasing organic milk consumption in schools.[22]

Tax policies and other incentives. Governments can ease household costs and guide diets by adjusting the value-added tax (VAT) on selected staples.[23] Ministries of finance could reduce the VAT on essential foods such as grains, dairy products, and produce to cut retail prices, while applying higher levies to less-nutritious food products.

Aggregate purchases through public procurement. Governments can improve food affordability by pooling the purchasing needs of schools, hospitals, and canteens into larger, coordinated contracts. This approach, typically led by national procurement agencies or inter-municipal consortia, creates economies of scale and allows buyers to negotiate lower per-unit prices.

Archetype 4: High-quality exporters with domestic gaps

The fourth group includes global leaders such as Argentina, China, and the United States that export high-quality food products through rigorous food safety standards, strict quality controls, export certifications, and other factors.

Argentina, for example, is the world's third-largest food exporter, with roughly 60 percent of all exports coming from agriculture and food products, including soymeal, corn, wheat, and grass-fed beef.[24,25] Robust food inspection and certification systems, combined with strong agricultural research networks, have enabled the country to maintain access to demanding markets like the E.U. and China.

The U.S. is another provider of food to the world. U.S. agricultural exports hit a record $213 billion in 2022, making the country one of the globe's leading suppliers of grains, oilseeds, meat, and other foods.[26] Similarly, China has rapidly grown into a major food producer in certain sectors, exporting nearly $100 billion in agrifood products annually.[27]

Improvement priority: Enhance public–private partnerships to make food more affordable for citizens

Despite the internationally respected agrifood systems of these countries, they also face growing gaps in affordability for their own citizens, due to inflation in food prices, stagnant household purchasing power, and other factors. Accordingly, they should leverage their strengths for the benefit of their citizens in need, whether through policies, social support, or partnerships with the private sector.

Infrastructure investment through PPPs. Geography creates disparities in these countries, with less-developed areas having the most underserved populations. Governments can use PPPs to spur investment in cold-chain infrastructure, rural food hubs, and last-mile logistics that connect producers to consumers in remote areas. These investments not only improve food access but also foster economic activity in remote areas through job creation in key sectors, including logistics and retail.

Incentives to favor local supply. Governments should incentivize farmers and companies to channel their food to local markets. For example, Brazil passed a law in 2016 requiring 30 percent of school food budgets to be spent on local produce, increasing access to nutritious foods while guaranteeing revenue for small farmers.[28]

Urban planning for food equity. Zoning laws in cities can reduce food deserts, as well as integrating city space for farmers markets, community gardens, and even urban farms. For example, Singapore now requires new developments to include vertical farming spaces to bring food sources closer to consumers.

Finland's comprehensive approach to food security

Some countries, including Finland, France, Ireland, and the Netherlands, have set balanced policies to outperform in food security overall and in each of the four pillars individually. Here is a closer look at Finland's approach.

Policy. Central to Finland's success is its comprehensive food policy, Food 2030, which promotes diversity, sustainability, safety, and resilience in food systems.[29]

Agritech. Despite its challenging climate, Finland has achieved near self-sufficiency in key food categories such as grains, meat, eggs, and milk. This is largely due to its investment in agritech innovations like digital farming, cold-resistant crops, and greenhouse systems.

Sustainability. Following in the footsteps of the E.U.'s common agricultural policy, the Finnish CAP Strategic Plan (2023–2027) reinforces food safety and sustainability by promoting traceable, organic, and innovative farming practices. It funds training, digital tools, and hygiene-enhancing measures, to support achieving a goal that 25 percent of public meals will be organic by 2030 and 20 percent of farmland will be organic by 2027.

Safety. Finland also exceeds E.U. food safety standards, exemplified by its national Salmonella control program, which has reduced foodborne illness rates to less than 1 percent. Its agriculture sector is recognized globally for its water quality, pest control, climate adaptation, and circular economy practices.

Education. For more than 80 years, Finland has pushed education and awareness to its younger population by mandating healthy, nutritious meals for students.

CONCLUSION

Although the current situation remains fluid and the effects are still unfolding, recent events reinforce a broader lesson: Food security resilience increasingly depends not only on domestic production, but also on diversified sourcing, flexible logistics, and shock-ready policy design.

There is no one-size-fits-all approach to accomplishing the food security balance across the globe's different geographies and food security archetypes. Each country must understand its own greatest needs and priorities, learn the lessons of the past, and use the applicable levers from the tool kit discussed above.

The right approach addresses both demand and supply. Demand can be addressed through education and by embedding meal programs into other government support. Supply can be addressed through subsidies, incentives, and investment in technology, among other measures. Moreover, governments don't have to tackle this issue alone. There is a huge role for the private sector, via properly structured partnerships that mitigate risks, especially in the earlier phase of initiatives.

Through this type of coordinated, comprehensive, and regionally specific approach, countries can create a more food-secure world.

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